

2015 TAX FILING RESOLUTION – EXEMPTIONS

Student’s Name: _____ **Phone:** _____

Reason for this form: After reviewing your financial aid application, the Financial Aid Office has found that you claimed an exemption for yourself and your parent(s) also claimed you as a dependent on their 2015 tax return. You cannot take an exemption for yourself if another taxpayer is entitled to claim you as a dependent. For more information refer to *IRS Publication 17-2015 Tax Guide for Individuals, Part One, Chapter 3*. (www.irs.gov/pub/irs-pdf/p17.pdf)

Action Required:

1. You (the dependent student) must **amend** your 2015 tax return.

2. Submit the following to our office:

a signed copy of **Form 1040X - Amended U.S. Individual Income Tax Return;**

AND

a **2015 Tax Return Transcript** Check “Your Eligibility Requirements” in Banner. Submit if status for “IRS tax return or FAFSA IRS DRT data-student” is anything other than “Submitted to FAO” or “Reviewed by FAO.”

AND

a signed copy of this form.

Certification

I certify that all information provided in this document is true, complete and accurate. I understand that if I purposely give false or misleading information I may be fined, sentenced to jail, or both.

Student signature: _____ **Date:** _____

Parent signature: _____ **Date:** _____

(Parent signature required if student is dependent for federal student aid purposes.)

See page 2 for instructions to request a Tax Return Transcript

<p>JCC Financial Aid Office PO Box 20 Jamestown, NY 14702-0020 Jamestown 716.338.1009 1.800.388.8557 ext 1009 Olean 716.376.7512 1.800.388.8557 ext 7512 FAX 716.338.1459 EMAIL financialaid@mail.sunyicc.edu We recommend you mail your documents via the US Postal Service to protect your personal information.</p>
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Request an IRS Tax Return Transcript

Online Request: www.irs.gov

- ❖ Under “Tools” click “Get a Tax Transcript.”
- ❖ Select “Get Transcript by Mail” and provide the identifying information requested.
- ❖ The IRS uses your SSN, date of birth, and the address used to file your tax return to verify your identity. *If you are experiencing difficulty check your address at www.usps.com. Click on “Look Up ZIP Code” and enter your street address and ZIP Code. The full address using standard formatting will be displayed. Use this address format.*
- ❖ Under “Type of Transcript” select **Return Transcript**. Under “Tax Year” select **2015**.
- ❖ You can expect to receive your tax return transcript via USPS in 5-10 days at the address on your 2015 tax return.
- ❖ Submit a copy of the tax return transcript to our office. Indicate student’s name and J# on your submission. Keep a copy of this document for your files.
- ❖ *Note: When selecting the “Type of Transcript” do not select “Account Transcript;” this document is not a complete record of the tax return and cannot be used for our purposes.*

Automated Telephone Request: 1-800-908-9946

1. Follow the automated prompts to enter the primary tax filer’s Social Security Number and the numbers of the street address as shown on the 2015 tax return.
2. Select “Option 2” to request a “Return Transcript.” Enter “2015” for the year. *Do not select “Option 1” for an “Account Transcript;” this document is not a complete record of the tax return.*
3. If your request is successful, the message on the telephone will indicate that the IRS has accepted your request.
4. You can expect to receive the transcript in 5-10 days at the address on your 2015 tax return.
5. Submit a copy of the tax return transcript to our office. Indicate student’s name and J# on your submission. Keep a copy of this document for your files.

What if my address has changed since I filed my last tax return and it doesn’t match IRS records when I try to use “Get Transcript by Mail” or the automated phone transcript service 1-800-908-9946?

Don’t use your old address. The transcript won’t get forwarded to you. You’ll need to file Form 8822, Change of Address, before you submit your Form 4506T-EZ. Generally, it takes four to six weeks to process a change of address. **See instruction below.**

Paper Request Form: www.irs.gov

1. You may file Form 4506T-EZ with the IRS. If your current address is different than the address on your most recent tax return filed, the IRS instructs that you need to file Form 8822. These forms are available for download at: <https://www.irs.gov/pub/irs-pdf/f4506tez.pdf> and <https://www.irs.gov/pub/irs-pdf/f8822.pdf>.
2. On Form 4506T-EZ complete lines 1 – 4 following the instructions provided by the IRS on page 2 of the form.
3. Please do not use line 5 to have the tax return transcript sent to our office as we may not be able to match the transcript to your student file.
4. On line 6, enter “2015” to receive a tax return transcript for the 2015 tax year.
5. Tax filer must sign and date form and provide a telephone number.
6. Mail or fax the completed form to the appropriate address (or fax number) provided on page 2 of the instructions for Form 4506T-EZ.
7. It may take up to 30 calendar days from the time that the IRS receives and processes the form to receive your transcript. ***The online and telephone request options are faster than the paper filing method.***
8. Submit a copy of the tax return transcript to our office. Indicate student’s name and J# on your submission. Keep a copy of this document for your files.